

# Case Based to Needs Based Service Delivery



Implementing Culture Change at Tulare County

Jason Britt  
HHSA Director  
Tulare County

Vail Dutto  
CEO  
InTelegy  
Corporation

# Topics

- **Tulare County HHSA Service Center – Jason Britt**
  - Background and historical drivers of change
  - Results: Continuing and early results on Intake
  - Building Stakeholder Support
- **The Needs Based Service Center Model – Vail Dutto**
  - Building Stakeholder Support –Continued
  - What decision did they make ?
    - Call Center vs. Service Center vs. Needs Based Service Center
  - High Level Service Center Models
  - Technology Tools
- **Appendix:** Stakeholder Support, Technology Tools definition, list of California Call and Service Centers

# The Need to Change

## Tulare County:

5 District Offices  
108,000 Continuing Cases  
6,500 Applications/Month

17,500 walk in clients/month  
31,000+ calls/month  
1.4% NAFS Error Rate

### 1. Current Economic Crisis

- Case Growth: 55% over the last five years
- Staff increases less than half the rate of case growth
- Governors budget expectations

### 2. Employee Concern over Growing Workload

- Rising caseloads & workload with no end in site
- Need vision and hope to overcome challenges

### 3. Customer Expectations & Capabilities

- Demographics; 67 % high school diploma, 13% bachelors degree, 59% own homes and 46% speak a language other than English
- Wide variety yet many use: ATM, Internet and computer, Smartphone ,gaming systems

### 4. Health Care Reform

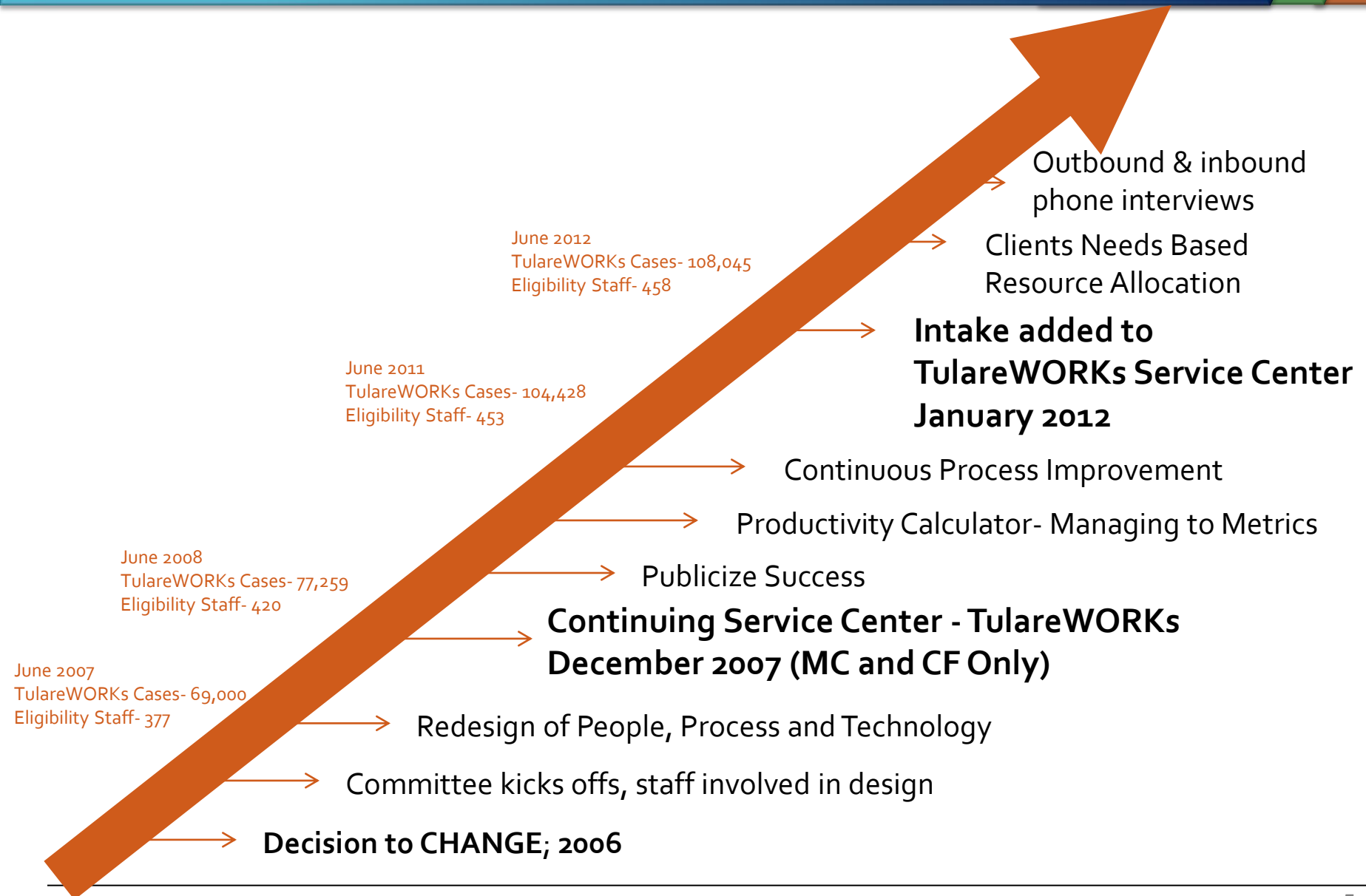
- Must be able to show that Tulare is prepared to handle additional growth efficiently

# The Guiding Principles of Change: Tulare County

Conclusion: Tulare Human Services determined that we must modernize our service delivery. We committed to change our service delivery to better serve our clients and give better tools to our staff utilizing the following guiding principles:

- **First Contact Resolution**
- **Minimize Handoffs**
- **Better Manage Workload; Improve Staff Efficiency**
- **Improve access to benefits by providing multiple channels**
- **Reduce processing time**
- **Reduce or eliminate client trips to an office**

# The Steps to Change





# The Guiding Principles of Change

Guiding Principle	Objectives Met?
First Contact Resolution	<ul style="list-style-type: none"><li>•Customer calls answered for all programs with most case updates completed on first contact</li><li>•Walk In client seen first by staff available to help</li></ul>
Minimize Handoffs	<ul style="list-style-type: none"><li>•Self Check-In has reduced the steps for the customer to access staff</li><li>•No call transfers for customer calls</li></ul>
Better Manage Workload; Staff Efficiency	<ul style="list-style-type: none"><li>•Supervisors have more visibility to all current and pending work</li></ul>
Improve access to benefits by providing multiple channels	<ul style="list-style-type: none"><li>•Intake and CalWORKs clients now have access to phone support</li><li>• Online applications increased</li></ul>
Reduce processing time	<ul style="list-style-type: none"><li>•Application processing times improved significantly in a short period of time</li></ul>
Reduce or eliminate client trips to an office	<ul style="list-style-type: none"><li>•Lobby traffic down 8%* in 6 months</li></ul> <p>* pre launch measurements not consistent, this is a conservative estimate</p>

# CalFresh Outcome Measures

- **CalFresh Application Processing Turnaround**
  - CF Expedited- 1 day on average
  - CalFresh - 6 days on average

- **CalFresh Error Rate\***
  - 1.39%
  - Improved 50% from FY 2011 3.11%

\*<http://www.cdsscounties.ca.gov/foodstamps/res/pdf/ErrorRateActive.pdf>



# Is the TulareWORKs Customer Happy?

## ■ Increase in Customer Access-

- Received 34,000 inbound calls for 108,000 cases
  - **70%** answered in **20** seconds or less; Average speed of answer < **60** seconds
- Average lobby wait time for walk in clients decreased by **25%**
- **4%** increase in online BCW applications; **100%** increase in CalFresh applications received via BCW
- After just two months **48%** of applications received by BCW, mail in, drop off or fax were processed by inbound/outbound phone interview group; with a contact success rate of **95%**
- Completion of CalFresh applications improved by average of 1 day while error rates remain below **2%**
- Same day application processing jumped **16%** to a total of **50%** of all CalFresh applications processed same day

# Is the TulareWORKs Customer Happy?

- **Increase in services provided**

- Self- Service check-in at lobby kiosk
- Check in process prioritizes appointments
- Reduced overall wait times for all clients
- Scanning of documents for immediate access

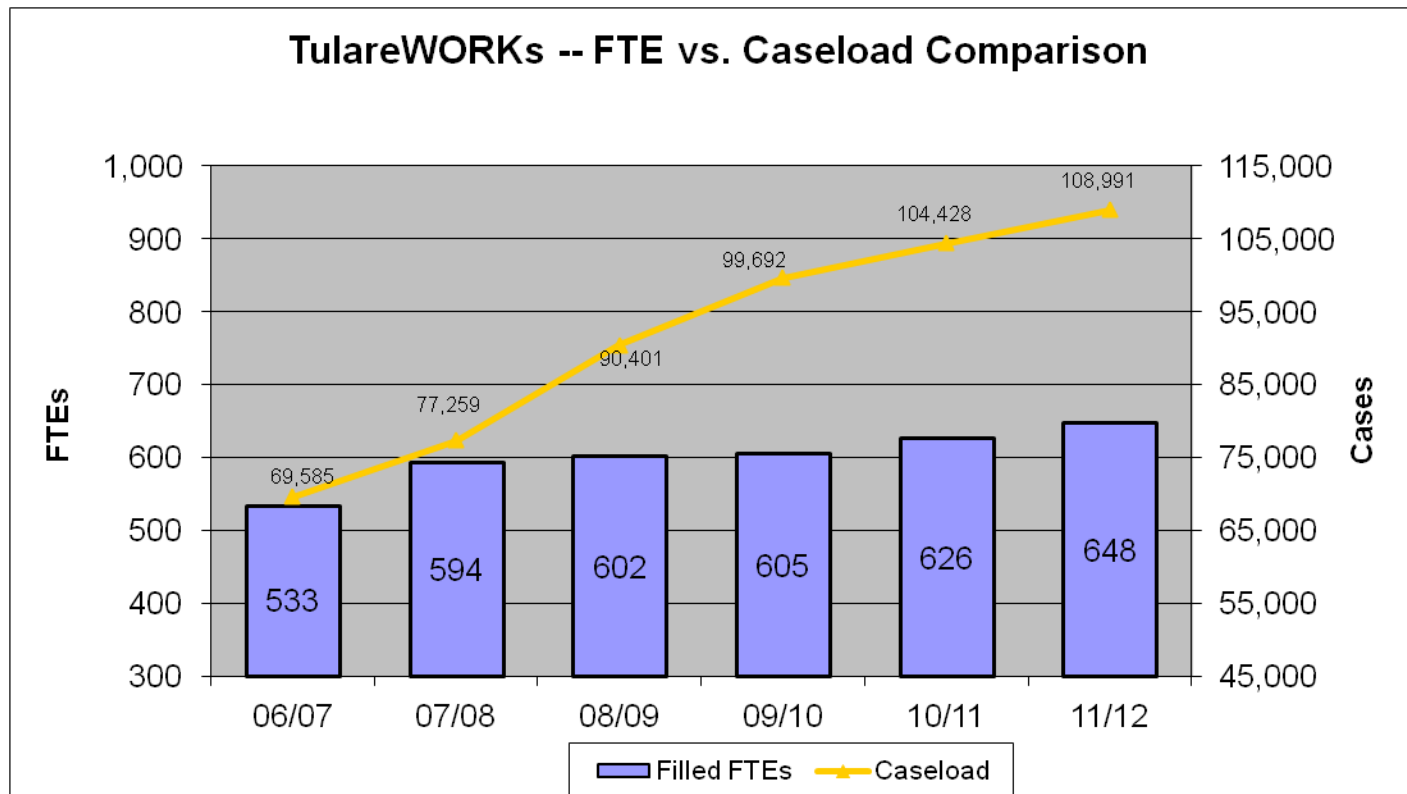
- **High customer satisfaction ratings**

- **90%** of 1,700 customer satisfaction survey respondents rated the quality of service received as Good or Excellent
- *"I'm glad to say that I was absolutely pleased with the helpful, quick and informative service I received"*
- *"I'm very satisfied and thankful for all the services but most of all the beautiful thing is that staff treated me with dignity"*

# Are the TulareWORKs employees more efficient?

- **Overall cases/EW has increased**

- Cases have grown **55%** in the last 6 years; CalFresh cases grew **115%**
- Eligibility staff increased in the same time period only **22%**



# Are the TulareWORKs employees more efficient?

## ■ Increased Call Handling

- Call volume to the service center has doubled since last year with the addition of CalWORKs and Intake calls.
- Eliminated the need for employees to return calls

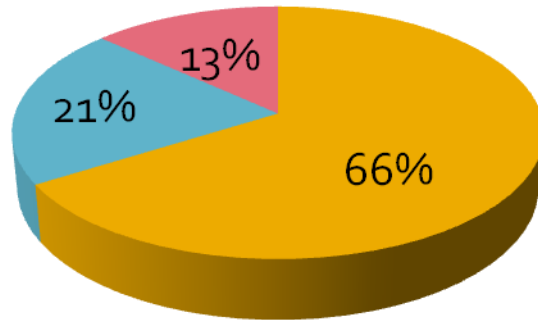
## ■ Increased Task Completion

- Tasks completed in the service center has increased by **50%** since the addition of CalWORKs and intake tasks to the service center.
- Our Task Management Tool (TMT) allows for flexible task assignment based on priority, workload needs and available resources
- Average of **6** Application Processing tasks/day/EW
- Average **8** RV/RC/day/EW

# Are the TulareWORKs Employees Happy?

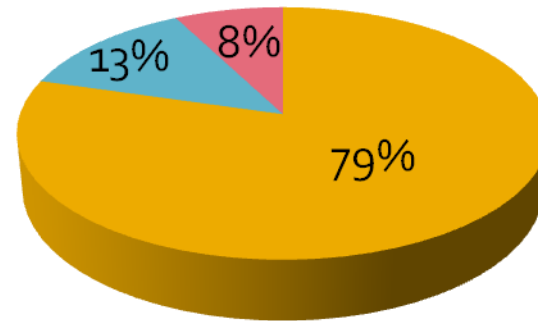
## Recent Employee Satisfaction Survey Results-

**We provide quality service to our clients**



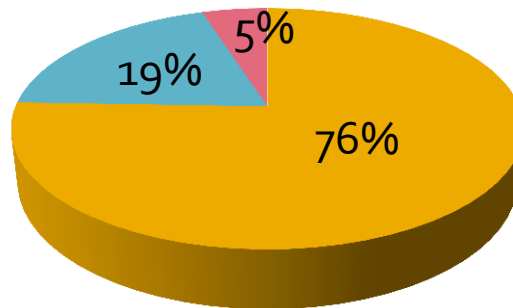
■ Strongly Agree/ Agree ■ Neutral ■ Disagree

**My work schedule is satisfactory and meets my needs**



■ Strongly Agree/ Agree ■ Neutral ■ Disagree

**Overall, I am satisfied with my job**



■ Strongly Agree/ Agree ■ Neutral ■ Disagree

# Building Stakeholder Support

- **Communication with the Union**
- **Obtaining Board Support**
- **Financial backing and budget support:**



- **Employee Involvement and Communication**

- Communication and adherence to the Guiding Principles when making process design decisions
- EW, Management and Union representation on committees
- Road shows and brown bags given by Director to all staff
- Manager selected early and vested in the success
- Cross County panels "Ask your peers"
- Newsletters, email updates – communicate early and often

# Topics

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- **Appendix:** Stakeholder Support, Technology Tools definition, list of California Call and Service Centers

# Overcoming Resistance to Change

	Issues/ Concerns	Message	Methods
<b>Labor Unions</b>	Change in working conditions; lack of case ownership=lack of job fulfillment	Emphasis on team work vs. individual case ownership	<ul style="list-style-type: none"> <li>•Early meet and confers</li> <li>•Presentation of the high level strategy and plan</li> <li>•Union representation on the committees</li> <li>•Executive communication that indicates that service delivery model is a management decision</li> </ul>
	New/different work-change in job classification	No job classification changes have occurred	
	Standards and measurements	Not able to discuss at this point until we know more/have more data. 'We must migrate from managing people and buildings to processes and outcomes'	
	Fear of staff reductions	Staff has not and is not projected to be reduced as a result of a service center environment. We are not servicing the customer with the staff we have , the service center is a business model that will allow us to more effectively serve our customers with our existing staff	



# Overcoming Resistance to Change

	Issues/Concerns	Message	Methods
Employee	Loss of client contact & clients desire to work with them	Client contact and the sense of satisfaction needs to transition to 'teamwork'. Clients will have more contact due to dedicated phone support.	•communicate, communicate, communicate!
	Loss of control of schedule	Yes, but is necessary to respond to client needs	•Brown bags lunches with management
	Workload	Service Center is focused on fair workload distribution. Employees work their schedules vs. work until they have completed 'their ' work	•Executive road shows •Monthly newsletters •Contests •Committee members sharing info with peers
	Change and Fear of the unknown	'You will be trained, we are all in this together' "Here is where you fit in the new organization" This change is necessary to help the CLIENT	•County panel of peers •Visits to other service centers •Most important; Management buy in & Executive involvement – discuss the WHY's of this change
	Accountability	Team accountability; case comments become critical	
	Harder on the client	The client is most concerned with getting timely service	

# Overcoming Stakeholder Resistance



**INTRODUCIENDO EL NUEVO  
"CENTRO DE LLAMADAS PARA  
ASISTENCIA DE COMIDAS"**

PARA TODOS SUS SERVICIOS DE ESTAMPILLAS DE COMIDA  
COMENZANDO OCTUBRE 23, TODOS LOS SERVICIOS DE LAS  
ESTAMPILLAS DE COMIDA PUEDEN SER ADMINISTRADAS POR EL  
NUEVO "CENTRO DE LLAMADAS PARA LA ASISTENCIA DE COMIDAS".  
AL TELEFONO 558-1001 (EN LUGAR DE LLAMAR A SU TRABAJADOR).

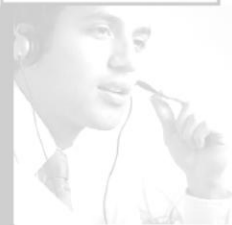
- LLAME DE LUNES - VIERNES, 8 A.M. - 5 P.M. ( INCLUYENDO LA HORA DE ALMUERZO )
- HABLE CON UN TRABAJADOR EN 7 DIFERENTES IDIOMAS

TIENE PREGUNTAS? LLAMENOS AL 558-1001 HOY.



## Something new

is coming to the Santa Barbara County Department of Social Services in fall 2008.



## The BSC is coming to Santa Barbara County.

The Santa Barbara County Department of Social Services will open a Benefit Service Center (BSC) in the fall of 2008 to provide service to our clients who receive Medi-Cal and/or Food Stamps benefits.

The BSC will operate much like other service centers, allowing you to call a toll-free number from 8:00 a.m. to 5:00 p.m. Monday through Friday. Our goal in opening the BSC is to provide a higher quality of service to you!

### What will be different?

- You will no longer have an assigned worker responsible for your case.
- When you call the toll-free number, you will be connected to an experienced eligibility worker to answer your questions and assist you with your benefits. All of your services will be provided through the BSC.
- There will be an automated system offering options, such as service in Spanish.
- All Medi-Cal and Food Stamp case records will be available to every BSC worker. Any worker that answers your call will be able to help you with your specific questions or requests.

### What will remain the same?

- If you receive CalWORKS or General Relief benefits, your Medi-Cal and Food Stamps will remain with your current worker.
- Applications for all programs will continue to be taken at existing offices in Santa Maria, Santa Barbara and Lompoc.
- Program rules for benefit eligibility will not change.

### What should you do?

- Turn in monthly and quarterly reports as soon and as complete as possible.
- Remember to report changes when required, as soon as possible.

We will provide you with more information when we are closer to opening the BSC. The BSC toll-free phone number will be provided at that time to bring service closer to you. If you have any questions, please contact your current worker.



**Benefits Call Center**  
1-888-421-8080  
TTY (831) 454-4763  
**Centro Telefónico de Beneficios**  
County of Santa Cruz  
Human Resources Agency  
[www.hra.co.santa-cruz.ca.us](http://www.hra.co.santa-cruz.ca.us)



**BENEFIT SERVICE CENTER**  
"Bringing Service Closer to You."

Illustration adapted from BSC logo submitted by Christine Thomas

# Overcoming Stakeholder Resistance

It takes a lot of courage to release the familiar and seemingly secure, to embrace the new. But there is no real security in what is no longer meaningful. There is more security in the adventurous and exciting, for in movement there is life, and in change there is power.

- Alan Cohen

## INSIDE THIS ISSUE



### PAGE ONE

What is in it 4 me?,  
Break Room Buzz



### PAGE TWO

Benefits Service  
Center, BSC Kickoff



### PAGE THREE

Self Sufficiency, What's  
Next?, Hot Links



## BREAK ROOM BUZZ

**Buzz:** People seem to have some concern about the cross training of Medi-Cal and Food Stamp staff.

**Facts:** All of us have seen

# THE Redesign news

## What's In It For Me?

That's the question on a lot of minds on the front-line. We have some answers for you. There are two sections to the Redesign project: 1) the Benefits Service Center (BSC) = Medi-Cal and Food Stamps, and clerical support; 2) the Self Sufficiency Center (SSC) = Eligibility, Clerical, Child Care, and WTW.

### A few of the advantages for staff assigned to a BSC:

- Staff have more protected time to work without interruptions
- Worry-free time off (no new tasks assigned while employee is gone, so you return to a clean desk and fresh start)

### If you're assigned to an Office Support Unit, you may really like this:

- Increased resources at the reception desk
- Cross training to serve multiple programs (increased transferable skills for your resume)
- Reduced duplication of work processes (mail, switchboard, supplies, imaging, benefit insurance)

# Overcoming Resistance to Change

	Issues/Concerns	Message	Methods
Client	Will I have to press a lot of buttons? (fear of technology)	There will always be an easy way to opt out. You will now have access 24/7 if you want it. You can always still go to the local office	<ul style="list-style-type: none"> <li>•Educate the client on communication channels and how to access</li> <li>•Support the client through the change; greeters in lobbies, education during interviews</li> <li>•Educate the CBO's to assist the client and the benefits of the service center</li> </ul>
	Will I have to tell my story more than once?	No, ideally, your problem will be solved on the first call or contact	
	I like my Eligibility worker	Reminder; eligibility workload is so great, the client is not speaking with their EW often today. Client satisfaction surveys have shown an increase in scores with the service center	

# Benefits of the Service Center

## ↑ Improve Employee Satisfaction

**Why:** Ability to service client without mounting paperwork and back log

**Results:** an average of 80% of employees now believe that they have the tools to do their job

## ↑ Improve Client Satisfaction

**Why:** Improved access and the ability to receive benefits quickly and conveniently

**Results:** Contact is up and wait time is down:

- An average of 30-40% of cases are contacting the county/month
- Average call wait times of no more than 5 minutes with longest wait time of 20 minutes – compared to lobby wait times of 45 minutes to 4 hours

# Benefits of the Service Center

## ↑ Improve Efficiencies & Management Visibility = Reduced Costs

### *Why:*

1. Reporting on tasks gives greater visibility to work load, priorities and resource requirements
2. Client needs based approach allows allocation of resources where work is required
3. Work Elimination -Calls answered, no client voice mails to return
4. Reduce inbound and outbound phone tag, Increased interview connect rate, reduced client reschedules & re-applications /renewal paperwork
5. Organized workflow through technology
  - Technology driven workflow allows for measuring performance and increases productivity
  - ACD – sends calls to scheduled and available EW
  - TMT – allocates tasks to staff with capacity with equalized workload management
  - Eliminates staff interruption of work flow to answer calls or see clients in the lobby

**Results:** Staff capacity has increased - the ratio of EW/case has increased by 30% while back log and time required to receive benefits has decreased



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# What decision did they make?

**Call Center:** a stand alone 'support' unit to handle customer inquiries via the telephone

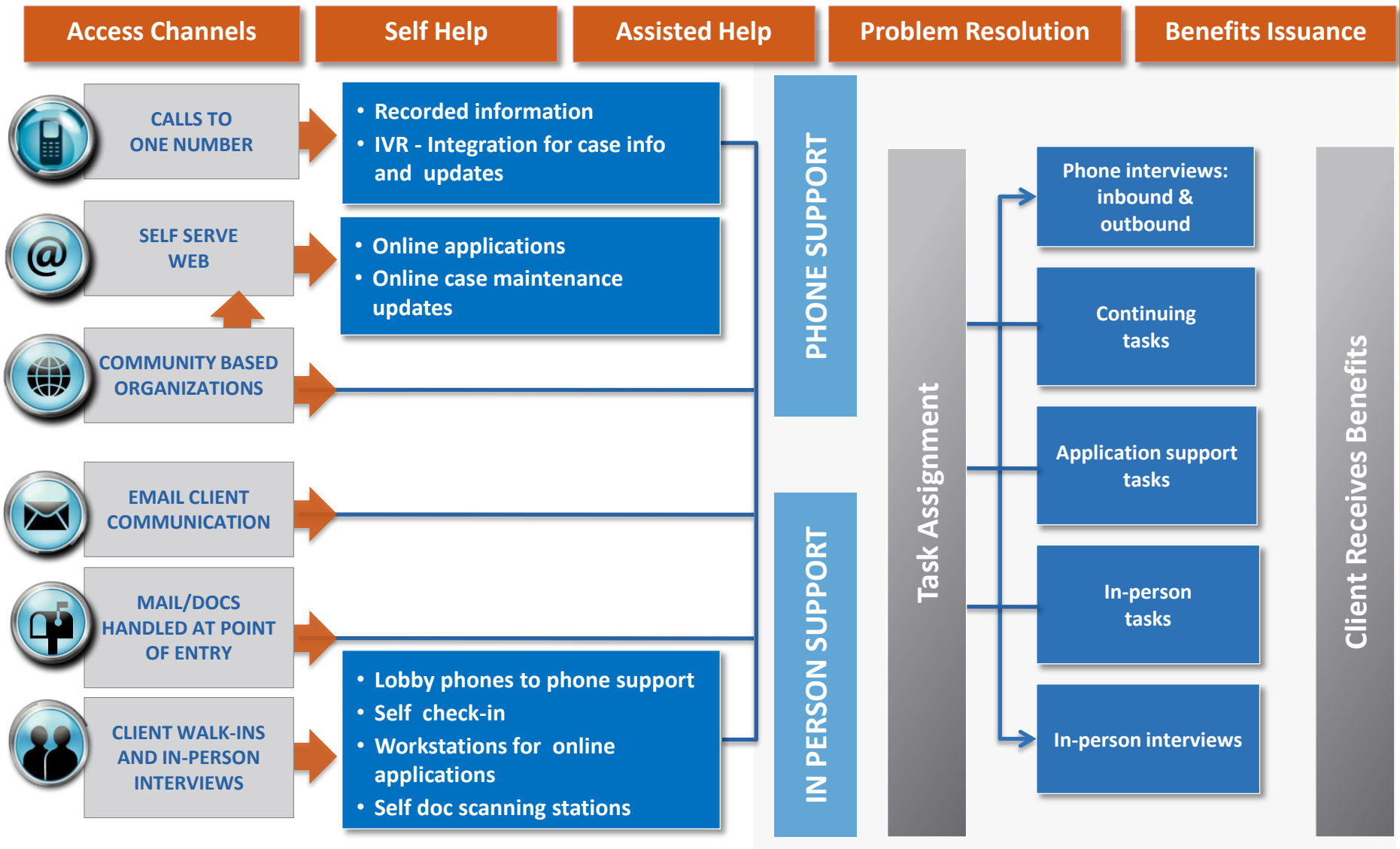
**Service Center:** a business process re-design that eliminates the case based relationship between EW and Client. The client is served by a team(s) of people; phone, maintenance and application processing and clerical units. Technology provides and supports increased client access.

**The Client Needs Based Service Center:** is a service center where workflow is determined by client Need; call volume, task volume and interview requirements are all dynamic. Therefore, staff work assignment is flexible to meet the dynamic needs of the client and efficiently utilize available staff resources. Technology provides increased client access and supports the measurement of efficient staff utilization.



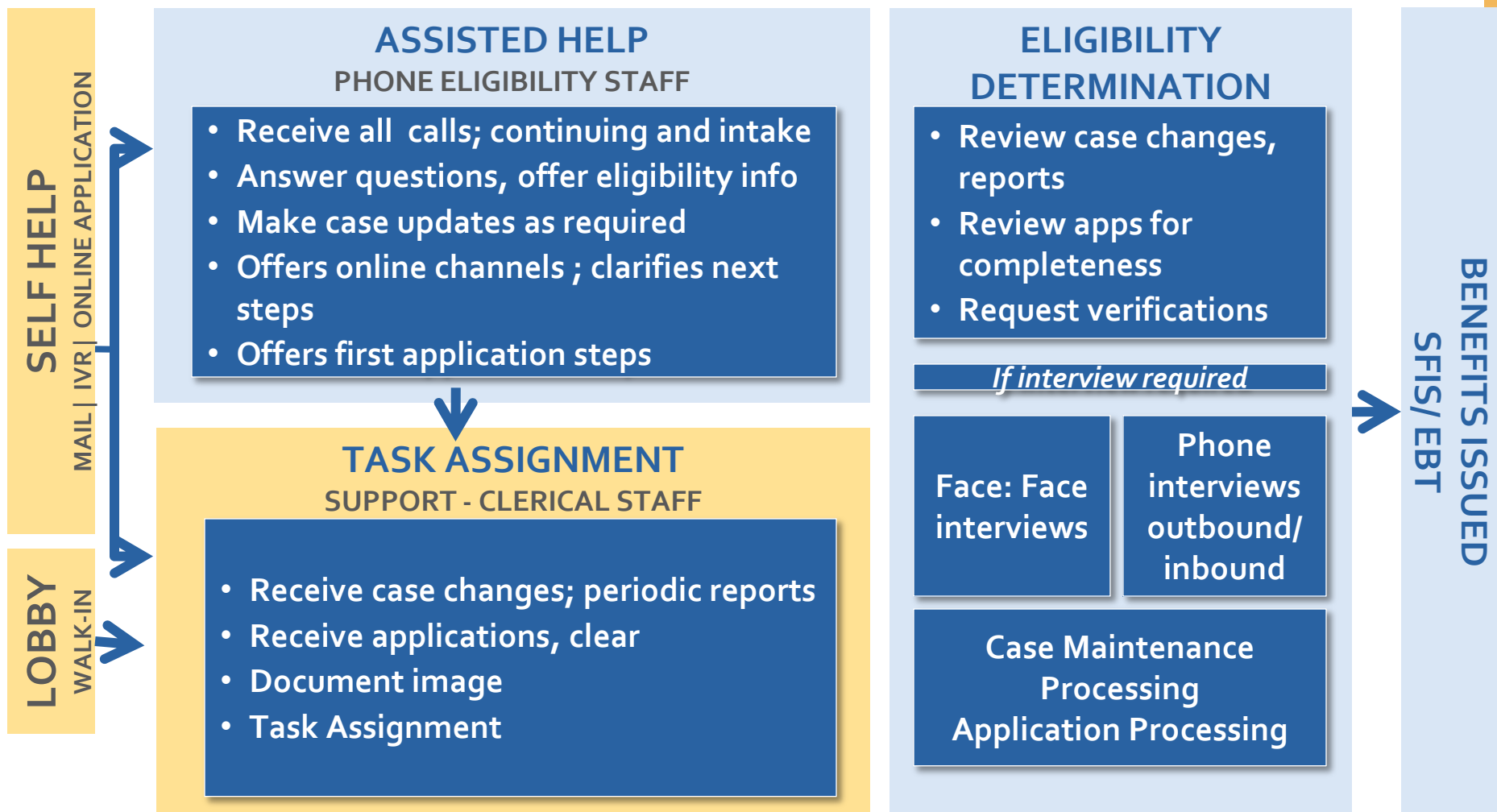
# Needs-Based Customer Experience

Standardized Processes & Leveraged Technologies for Benefits Programs



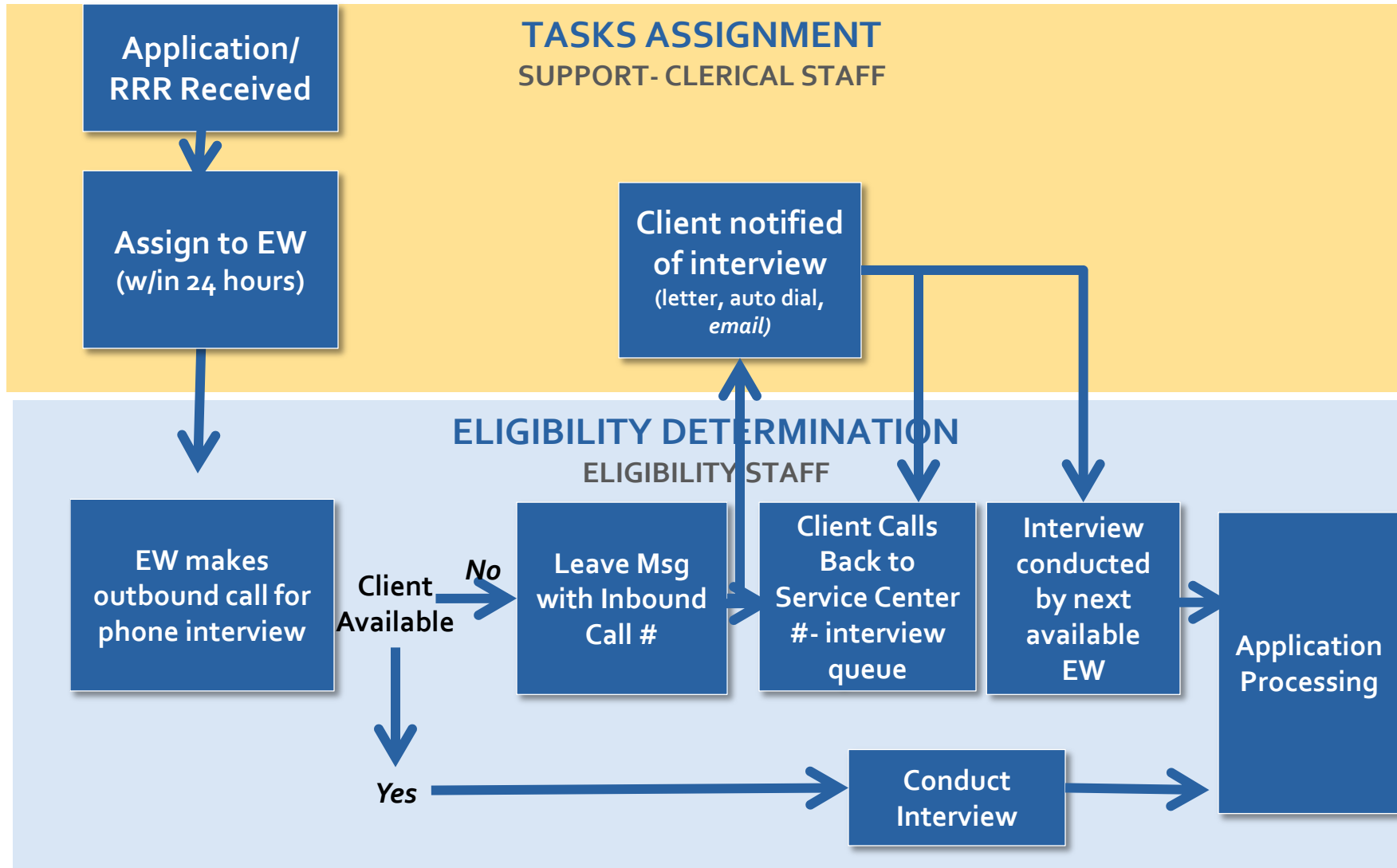
# Standardized Eligibility Process

## Continuing and Intake Operations



# Phone Interview Process

## Intake and RRR Interviews



# Service Center Technology

	Routing / Queuing of Workflow	Measuring, Managing, Optimizing Staff	Planning	Work/Call Avoidance
INTAKE AND CONTINUING + CONTINUING	<ul style="list-style-type: none"> <li>•IVR</li> <li>•ACD/VRU</li> <li>•Task Management Tool (TMT)</li> <li>•TMT linked with appointment / lobby scheduling</li> </ul>	<ul style="list-style-type: none"> <li>•Call review &amp; call recording</li> <li>•IVR/ACD reports—detailed reporting</li> <li>•TMT reporting</li> <li>•Productivity calculator: TMT reports / HR system</li> <li>•Automated dashboard</li> </ul>	<ul style="list-style-type: none"> <li>•Workforce management forecasting &amp; scheduling</li> <li>•Staffing model</li> <li>•Scheduling for lobby activities</li> </ul>	<ul style="list-style-type: none"> <li>•Document imaging</li> <li>•Self service/online tools</li> <li>•Document imaging linked with TMT</li> <li>•Automated dialer/messaging for interview notification</li> <li>•Self service: online applications</li> <li>•Kiosks/ access points</li> </ul>
FUTURE + ENHANCEMENTS	<ul style="list-style-type: none"> <li>•Email management</li> <li>•ASR: Speech recognition</li> <li>•Workflow</li> </ul>	<ul style="list-style-type: none"> <li>•Online verification</li> <li>•Electronic signature</li> <li>•Multimedia email, chat, phone and video</li> </ul>	<ul style="list-style-type: none"> <li>•Dynamic forecasting and scheduling</li> </ul>	<ul style="list-style-type: none"> <li>•CTI; Screen pops</li> <li>•Predictive dialer for inbound phone interviews</li> <li>•Online verification</li> </ul>

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# Needs-Based Service Center Technology Recommendations

Business Requirements	Technology in Place	Functionality Summary
<b>Telephony</b>		
<b>Phones, Automated Call Distribution (ACD)</b>	Avaya, NEC, Cisco, Genesys-Qwest hosted, C-IV	Management of phone traffic based on volume, program and language skill routing. Customizable real-time and historical reporting
<b>Integrated Voice Response (IVR)</b>	Access CalWIN, Cisco, Voice Mail products, C-IV IVR	Allows customers to interact with a CalWIN/CIV system via a telephone keypad or by speech recognition, after which they can service their own inquiries by following the IVR dialogue.
<b>Speech Recognition</b>	Nuance	For integrated use of IVR without key pad entry
<b>Call Back/ Virtual Hold</b>	Syntellect	Maintain your place in queue, when your turn is up predictive dialer makes calls and links with agent. Can be feature on ACD
<b>Call Recording &amp; Screen Capture- QA Software</b>	I-Vault; Verint, Calbrio, Aastra	The ability to capture worker screen flows synchronized to the call recordings for quality processes
<b>Phone WFM &amp; Scheduling</b>	Monet, Calabrio, Qwst WFM, Verint Impact, Witness, NICE systems	Provide data based on historical data to forecast staffing by time and skill set to support phone activities.
<b>Auto-Dialer</b>	n/a	Tool that automates calls to client for appointment notification and reminder
<b>Predictive Dialer</b>	n/a	Phone interviews conducted via predictive dialer

# Needs-Based Service Center Technology Recommendations

Business Requirements	Technology n Place	Functionality Summary
<b>Task Assignment and Management</b>		
<b>Task Management Tool</b>	CA Technologies, in-house tool built in ASP.NET, Visual Studio, Northwoods	<ol style="list-style-type: none"> <li>1. Linked with document imaging for automated task recognition</li> <li>2. CalWIN/CIV data uploads for batch task assignment</li> <li>3. Load balancing by skill set and staff schedule/attendance</li> </ol>
<b>Appointment Scheduling &amp; Notifications</b>	Northwoods Compass Q-Matic EZApp	<ol style="list-style-type: none"> <li>1. Manages schedule appointments and walk-in clients, links appointments to eligibility workers.</li> <li>2. Can be integrated with self check in technology with automatic notifications to assigned workers and to clerical in lobby</li> <li>3. Solutions available with client self scheduling options (not in place today in county service centers)</li> </ol>
<b>Lobby Management</b>	Northwoods Compass Q-Matic EZApp	<ol style="list-style-type: none"> <li>1. Manage client arrivals and queuing for service in lobby</li> <li>2. Links to Appointment tool and self check in</li> </ol>
<b>Email Management</b>	n/a	<ol style="list-style-type: none"> <li>1. Routing and tracking of email communication</li> <li>2. Routes to task management tool</li> </ol>
<b>Electronic Signature</b>	Northwoods Compass- signature via pad Call recording	Signature through online form; Verbal signature via recordings; Email/Web based signature with IP stamp; Specific technology and process requirements for each channel would require additional research
<b>Online Verification Access</b>	n/a	Access to public records- bills, drivers license, property and car tax
<b>Document Imaging – Capture &amp; Retrieval PDF-TIF Translation</b>	FileNet /Kofax, OnBase, Northwoods, Fortis, DocStar, C-IV, SIRE, Questys	<ol style="list-style-type: none"> <li>1. Deliver Point of Entry scanning of documents without barcode sheets.</li> <li>2. Create a temporary folder for viewing and managing documents- for intake processes</li> <li>3. Line with TMT for task assignment</li> </ol>
<b>Staffing Model</b>	Primary Matters Guide	Tracks activities (tasks) by volume and assumptions of handle time to identify staffing requirements, project future staff requirements based on case and call growth projections.

# Needs-Based Service Center Technology Recommendations

Business Requirements	Technology in Place	Functionality Summary
<b>Web Support</b>		
<b>Online Applications and Case Management</b>	C4Yourself.com Benefits CalWIN	Web portals offering online applications, RRR documents and QR& documents. Client is able to interact with online documents to complete and submit.
<b>On-line Chat/ Click to Call</b>	n/a	Could be used to provide support for county website visitors and BCW/C4Yourself users
<b>Self Service Options</b>		
<b>Lobby Phone</b>	All Phone systems represented on ACD List	Provides clients direct access to phone support via phone located in lobby. Also provide access to self-help IVR
<b>Self Service Lobby Check-In &amp; Display</b>	Workstations: HP & Displays; Kiosks- Northwoods, EZ App, Q-Matic	<ol style="list-style-type: none"> <li>1. Self Service Touch Screens for clients to request a service</li> <li>2. Auto generates a Request in TMT for action by staff</li> <li>3. Displays the ticket # and directs client</li> </ol>
<b>Self Service Online Applications in Lobby</b>	BCW Self Serve with Self-Scanning	Self service workstation that allows access to Benefits CalWIN or C4Yourself only (locked down)
<b>Self Service Scanning</b>	n/a	Scanner that can accept multiple document types and scan drivers licenses or other documents that now require copying, client identifies scanned document via case number or SS#
<b>Lobby Display</b>	Flat screens and industry standard reader boards	Display lobby numbers for serving next notification Rights and Responsibilities videos; benefits notifications



# California County Service Centers

COUNTY	CONTINUING	INTAKE
Contra Costa County: Medi Cal & CalFresh Service Center	Nov. 2005	Planned 2013
Fresno County: Medi-Cal, CalFresh & CalWORKs	Planned 2013	Planned 2013
Humboldt County: Medi-Cal, CalFresh & CalWORKs	Planned 2012	Planned 2012
Kern County *	2011	
Los Angeles*	2007	
Orange County: Medi-Cal & CalFresh	Nov. 2010	
Placer County: Medi-Cal, CalFresh and CalWORKs and GA	Sept. 2011	Sept. 2011
Riverside County: Medi-Cal & CalFresh	Oct. 2010	2011*
Sacramento County: Medi-Cal & CalFresh	Jun '10 MC/Oct '11 CF	Oct. 2011
San Bernardino County*	2011	
San Diego County*	2007	
San Francisco City & County: Non Assistance CalFresh	Oct. 2007	Planned 2012
San Mateo County: Medi-Cal & CalFresh	Nov. 2003	Planned 2012
Santa Barbara County: Medi-Cal & CalFresh	Sept. 2008	
Santa Clara County: Medi-Cal & CalFresh	March 2006 MC, CF Aug. 2011 CW	April 2011
Santa Cruz County: Medi-Cal, CalFresh, Foster Care, CalWORKs	March 2006 MC, CF March 2009 FC, CW	March 2009 MC
Solano County: Medi-Cal & CalFresh	June 2008	
Sonoma County: Medi-Cal & CalFresh	March 2007	
Tulare County: Medi-Cal and CalFresh	Dec. 2007	Jan 2012

\* Implementations not in collaboration with InTelegy Corporation

# The Guiding Principles of Change

	Client Needs-Based Service Center	Service Center	Call Center
First Contact Resolution	✓	✓	
Minimize Handoffs	✓	✓	
Better Manage Workload; Staff Efficiency	✓		
Improve access to benefits by providing multiple channels	✓	✓	✓
Reduce processing time	✓	✓	
Reduce or eliminate client trips to an office	✓	✓	✓